DOCUMENT RESUME

ED 311 233 CE 053 232

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TITLE Trends and Updates in Secretarial Education.
PUB DATE May 89
NOTE 21p.; Paper presented at the Annual Conference of the Philippine Association of Secretarial Educators (22nd, Cebu City, Philippines, May 26-28, 1989).
PUB TYPE Speeches/Conference Papers (150) -- Information Analyses (070)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Business Education; *Database Management Systems; Information Retrieval; Information Storage; *Interpersonal Competence; *Office Occupations Education; *Secretaries; *Technological Advancement; Telephone Communications Systems; *Word Processing

ABSTRACT

This document addresses curriculum requirements for the following modern secretarial functions: (1) being the primary source for storage and retrieval of information; (2) transmitting the company image to clients; and (3) filtering client contact and information to administrators served. To prepare them for storage and retrieval, secretaries should take an initial course in word processing, at least one course on using the most popular database management system of the time, and learn to perform a database search on a large central source of information or a computer airline schedule. They should be taught to use a computer program to handle basic accounting functions and to maintain an electronic calendar. Because of the information they will handle, students should be made aware of the rights to privacy. In order to transmit the company image to clients, they must be able to operate sophisticated telephone equipment, record messages quickly, and make callers feel attended to and comfortable. They should be able to operate such office machines as copiers and facsimile machines. In order to fulfill their function of filtering client contact to administrators, secretarial students should be exposed to identifying and handling common interpersonal situations through simulations. (Fifteen references are included.) (CML)

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Trends and Updates in Secretarial Education

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Address to Philippine Association of Secretarial Educators' 22nd Annual Conference, University of San Jose-Recoletos, Cebu City, Philippines, May 26-28, 1989

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Introduction

Life in the office of the 1980's has changed dramatically from office life experienced during previous decades of this century. The computer and other electronic devices have altered the speed, quality, and complexity of all the office workers, especially that of the secretary. Since this conference is focused on trends and updates in secretarial education, I as a curriculum developer am concerned that, before we update an existing curriculum, we first examine the changes which have occurred from the time the original curriculum was prepared to the present.

My mother was prepared to be a legal secretary during the 1920's. The modern office consisted of a one-line telephone, a mechanical typewriter, a hand-cranked calculator, and metal filing cabinets. She learned shorthand so that she could quickly record the boss's thoughts and practiced accurate spelling and punctuation. From her transcriptions she prepared correspondence on the mechanical typewriter, preparing copies with carbon paper. Financial records were kept using ledger sheets and fountain pen. Addition occurred faster in one's head than keying in and cranking the calculator. Client information was kept in paper files in alphabetical order and available to anyone in the office. The manager answered his own telephone as her position served a support function in the office. My mother raised her children and returned to work in the 1950's at a major firm whose facilities were little different from her first position.

My son's girlfriend is beginning her career as a secretary in a local church. She is facing a far different office than the one which was prevalent from the 1920's through the 1970's. This church office utilizes a multiple line telphone system with connections to

various rooms throughout the facilitiy and several computers installed with multiple types of software as desktop publishing to prepare the church Bulletin, graphics programs to create flyers, a database system to store the church directory of thousands of members, spreadsheet to manage the finances of the church, and word processing to create and store the myriad of correspondence and sermons of the church ministers. Coupled with those computers are laser printers, copy machines which have multiple functions such as enlarging, collating, stapling and a FAX machine to transmit important documents.

The modern secretary has been elevated from a support function to the position of a key gatekeeper in the office. The secretary is the one who possesses the knowledge to create and retrieve information using the computer, transmits the firm's image the clients, and has access to the decision-makers in the firm. Gigliotti, a U. S. Professor of Business Administration, remarked that "A secretary of the eighties and nineties is no longer one who types, take shorthand, and answers telephones. The secretary of the nineties will be one who is...considered part of the management team (Gigliotti,1986)."

These three functions--primary source for storage and retrieval of information, transmitting company image to clients, and filtering client contact and information to administrators served--are the ones I wish to address as we explore updating secretarial education for the 1990's.

Changing Technological Requirments

An analysis of job announcements in the *L. A. Times* on any given day indicates that computer skills are a requirement for almost all secretarial positions. Word processing skills are most frequently mentioned followed by use of spreadsheets and database

management. Lotus 1-2-3 for the IBM is the most popular software program mentioned. The outdated term "typing" is being replaced by "keyboarding." The similarity to the past is that speed requirements are similar. 40 words per minute is considered minimal, 45-65 is desirable, and a few positions required 80-90 words per minute. This analysis indicates that all entry level secretaries must feel comfortable with computers and have a basic knowledge of word processing, spreadsheets, and database management software.

Erickson, UCLA Professor Emeritus in Business Education (1986), has suggested that keyboarding should be a requirement before other computer skills are taught. He is concerned that speed and accuracy on the computer is not possible without basic keyboarding skills. His work with elementary children as well as adults indicated that keyboarding skills predicted the degree of achievement on the computer. Therefore, he recommends to you that keyboarding be a requirement or first course prior to other work on the computer. Visitations and interviews with community college instructors in secretarial education indicated that keyboarding or standard typing is a first course and/or pre-requisite to other computer application courses.

Krey, Donin and Henry (1986) predict that secretaries of the 1990's must have an array of computer skills. They indicate that though word-processing is considered the focus of a secretary's work, secretaries must maintain data bases, use graphics, prepare data searches, handle simple accounting functions, utilize large data bases such as airline schedules, record and messages electronically, and maintain appointments and calendars electronically. Such a prediction means that secretarial education programs must include several computer courses.

Fruehling and Weaver (1986) describe the state-of-the-art secretary as one who "has the skills needed for using electronic equipment in a workstation-specific environment." They further elaborate that the modern secretary is one who has a "thorough working knowledge of the hardware, software, and interactive capabilities of integrated office systems." They strongly advocate revamping existing secretarial curriculum to teach these needed skills as well as to provide secretaries already employed with skills to work in the modern computerized office.

In many high schools, a general computer literacy precedes specific courses in computer applications (Miller, 1983; Nowak, 1989; Rincon, 1989). Such a computer literacy course introduces the student to the components of the computer hardware, terms, functions of the computer, and various computer applications. If such a course is not available in high schools, secretarial programs may want to place such a course in the first semester along with a basic course in keyboarding.

At the high school, community college, and proprietary schools in USA, word-processing has become an essential component of all secretarial education (Nowak, 1989; Rincon, 1989; Yong, 1989). Model high school curriculum require a semester of keyboarding for every student, college-bound or vocation-oriented. This is followed by an additional semester or more in word-processing for both groups and required for business education students. Community colleges and business schools usually offer an array of word-processing courses, which focus on particular software packages. Most secretarial programs require a minimum of two courses in word-processing. Word-processing courses couple skill on the computer with business writing skills. Practice in word-processing occurs in computer laboratory rooms. Programs which use slides, cassette tapes, standard programmed texts, and the computer are

sequentially organized to increase the student's skills from simple to complex.

My personal recommendation for secretarial training is that one software package be introduced and mastered rather than making the student acquainted with several programs. It is more important that the student acquire the concept of the computer as an electronic pad that can insert, delete and move text than acquire a host of alternative ways to do the same thing. A student armed with fluency in one software program can acquire the specific skills of a different program on the job. My own preference is that an initial course in word-processing introduce the student to common commands and procedures so that creative writing skills precede formatting procedures. The presentation by Santos and Protacio will describe the substance of teaching basic computer and word-processing skills using Lotus 1-2-3 and Word Perfect.

The next most important set of computer skills is database management. Database management has become a part of most offices. Names, addresses and telephone numbers of clients are stored so that information can be retrieved in a number of ways. Information can be retrieved by name of client, zip code, policy number, name of salesperson, and the like. In the church office, names of members may be retrieved by birth date for a special remembrance by the minister or by age so that flyers of the activities of age-related church groups may be sent. Database management has other uses by firms which have multiple listings as branch offices, departments, or product inventories. The following is an example from a real estate office. The office secretary has a database listing of tenants on the computer. The secretary can access the names of all the tenants whose lease is up at a given date so that appropriate notices can be sent.

Basic secretarial curriculum should include at least one course on storage and retrieval using the most popular database management system of the time. Lotus 1-2-3 and DBase III are popular products in the USA for IBM and Excel and Microsoft File for the Macintosh.

Database searches are a part of every library and industry which depend on a central source of information. Such databases have been common to university researchers since the 1960's and to the law profession since the 1970's. Secretaries should become acquainted with "descriptors," key words that describe the content, and how to use multiple descriptors to narrow a search for the desired information. For example, in law the attorney will give a secretary a listing of various case descriptors. The secretary will key in those descriptors and utilize appropriate commands to locate citations of law cases which fit those descriptors.

Teaching prospective secretaries to perform a data base search and computer airline schedule search may not require a special course. However, such skills should be incorporated into a course for database management. These skills may be included toward the end of the course as special skills using data bases.

Secretaries should be able to use a computer program to handle basic accounting functions. In smaller offices, secretaries often assume basic accounting tasks as accounts payable, accounts receivable, payroll and office inventory. User friendly computer programs make these tasks easier for the secretary than the old ledger forms. Business Sense and Check Mark are examples of such user friendly accounting programs. Regular maintenance of these accounting programs makes submission of financial information from governing members or to the government itself an easy task. In USA, NBEA Public Relation Committee (Usdan, 1984) reported that

95% of businesses employ less than 50 people. In such businesses, secretaries are expected to handle some accounting functions.

Another change in the office is that the desk calendar and appointment books are being replaced by electronic calendars. A state-of-the-art secretary should be skilled in maintaining an electronic calendar. The calendars of several people can be kept on one computerized calendar. Using such a calendar, the secretary can print out a copy of each manager's schedule for the day, the week, or the month. The secretary can also determine when a group of people are free to attend a meeting or conference. The calendar can be multiple accessed by both the secretary and the manager so that changes in the schedule can be maintained. A popular program called Hypercard has subprograms which maintains calendars and address lists. The secretary can call up a sales manager's program for the day as well as the addresses and telephone numbers of the clients he is to meet. See Appendix for samples.

These storage and retrieval activities of the secretary indicate the powerful position that a secretary holds. Such ready access to important information about a firm and its clients suggests that the contemporary secretary understand the ethics of using such information. The secretary needs to understand rights of privacy and who is privileged to access which information.

Transmitting the Firm's Image

The second major function of the secretary is transmitting the firm's image to its clients. For many firms this transmission is accomplished through electronic means, mainly the telephone and correspondence. The requirements for a successful secretary have not changed since my mother's day. The secretary should handle the caller in a courteous manner and should present written information

neatly and in correct form. However, the means to reach this same objective has become more complex.

The once easy-to-use telephone has become multi-functional and interfaces with numerous persons through both internal and external lines. Most secretaries operate a sophisticated piece of telephone equipment which requires an understanding of the telephone's many functions. The secretary needs to handle the various complex functions of transferring callers from one telephone to the next, placing calls on hold, and correctly remembering to continually service the caller. A major complaint by U.S. customers is that their calls are placed on hold for a long time, calls are disconnected, calls are incorrectly transferred, no one answers calls within 7 rings, or the secretary is busily talking to someone else in the office. Such telephone rudeness irritates callers and presents a poor image to the customer.

An aspect of telephone courtesy is a facile skill at correct operation of the telephone. Pleasant tones and repeated assurances cannot atone for disconnections, wrong connections, and repeated transfers. Telephone operation should become a part of basic secretarial curriculum. Telephone operation consists of three parts. The first part is that prospective secretaries need to be able to understand and be able to handle the actual operation of this multi-functional piece of equipment. I am constantly amazed at the sophistication of the modern telephone. Numerous callers can be placed on hold, transferred to instruments in other parts of a building and other buildings, and callers from around the world can be interconnected in a conference call. Prospective secretaries should have the knowledge and skill to handle these functions and ask questions about the telephone in their own office.

A second part of telephone courtesy is to be able to record accurate messages in a short time. Forms or an anxillary computer

should be available to that checks can be placed next to appropriate statements, such as "call back" or "confirm appointment" rather than writing out information in order to expedite the time taking the message. Secretaries need to understand when a complete message has been taken so that misunderstanding is not created because of a faulty message. To me, an ideal secreatary is one who could create the best form for his or her office to reduce time taken in writing message longhand.

The third part of telephone skill is speaking in appropriate tones and saying words which make the caller feel at ease and served by the secretary. This is not an easy skill to teach or acquire. During my own training as a telephone representative, we spent many hours in role simulations calling other members of the class. Following these role simulation we critiqued each other on such criteria as pleasantness of voice, skill in handling potential conflict, and courtesy in dealing with the customer's concerns. In businesses other than the telephone company such training is occurring because prospective secretaries and other employees lack such training. Nordstrom Department Store's training department has developed a training program for all their new employees. They want their customers to perceive a sense of service and want callers to that store cared for in an accurate, swift and courteous manner by all employees. Pepperdine University had their secretaries trained in that program. Similar procedures should become a part of basic secretarial training.

Written communication is another form of transmitting the firm's image. Technology has made preparing correspondence for mailing more complex. Spelling, punctuation and grammar continue to be important skills for a secretary (Medley, 1970; Bennett, 1986)). This need continues to be emphasized in employment advertisments. (*L.A. Times*, 1989) Proper use of the English language should be incorporated into every secretarial course. USA employers have

continually complained about poor language skills among secretarial and clerical employees (Gigliotti, 1986). The Katherine Gibbs School, Inc., a proprietary school, indicates that teaching proper language, including spelling, grammar and syntax is the focal point of their secretarial curriculum. Though computer word-processing programs are usually coupled with dictionaries, spellchecks and Thesaurus programs, a good vocabulary, knowledge of grammar and spelling are pre-requisite skills to full use of these programs. For example, if a secretary does not know that "their" is different from "there," using a spellcheck will not correct the error.

Today's secretary interfaces with a variety of machines in the process of sending correspondence. For even the simplest of correspondence, the secretary inputs on the computerized word-processor, prints on a separate printer, and prepares copies using another machine. Often, the correspondence may require graphics to be included with the copy. Another frequent secretarial activity is using a copier to enlarge or reduce text or graphics. For most offices, correspondence requiring immediate action is transmitted via FAX.

Secretarial education should prepare the entry-level secretary for this world of office machines. A recent interview with Linda Rincon(1989), Department Chair, Business Education, the director of an award-winning business education program in Tucson, Arizona, revealed that working with transcription machines has replaced shorthand and training in the use of the multi-functional copier is part of their curriculum. On visits to the community colleges, high schools, and businesses I did not witness any shorthand in curriculum or practice. But, I did observe transcribers in many locations, medical, legal, church, and regular business offices. Transcription is a three unit class in most community college secretarial programs. All offices have a copier and most have a FAX. Most copiers are multi-functional and computer-driven. The secretary needs to have the skills to operate the machine, handling

such functions as collating, enlarging, changing size of paper, changing contast of print and the like. Oftentimes, the secretary becomes the person who also must know how to clear up simple operational difficulties. The model program in Tucson includes such training in their program.

Maintaining up-to-the minute office machines can be a costly enterprise for most secretarial schools. In America, businesses are willing to assist secretarial training programs because they need trained secretaries. Model school programs and every community college program have a business-oriented advisory council who regularly meet with instructors and the director of the program. The task of these advisors is to describe new machines, new functions, and contemporary problems occurring in various types of offices. Dr. Jon Nowak, creator of a model business program in Long Beach, California, remarked that business leaders in the community were the driving force of the curriculum. They suggested new topics, new ideas, and offered to donate equipment. They were powerful community members who could convince governments that they should spend money on new equipment for training. The same comments were echoed by secretarial program directors in other parts of U.S.A. The model high school program in Tucson obtained a transcriber and a computer for every member of the secretarial class because Advisory members urged that these machines were regularly used in their offices. They forced typewriters out of these classrooms. They urged that accounting and computer applications be included in the curriculum.

In Long Beach, the businesses contributed funds to create a model office and continue to purchase new equipment to update that office. These same businesses open their offices for parttime internships for secretarial students. During these internships, students spend part of a day, two to four times a week, in the office. They handle entry-level tasks, practicing the skills taught in the

classroom. Such internships last four to eight weeks. The students do not receive any money for this week. It is considered an opportunity to learn about life on the job. Both students and businesses find this cooperative relationship a positive one. The practical placements serve the students as references for obtaining their first position as a secretary (Akeyo, 1984; Solomon, 1974).

As supervisors for these on-the-job opportunities, business teachers assume the role of parents who send forth their children. They prepare them as best they can for their new life.

Acquiring Interpersonal Skills

The third primary function of a secretary--serving the role of gatekeeper to the decision-makers in the firm--is the function often missing from entry-level secretarial programs. This role requires a wide range of behavioral skills that is usually excluded from secretarial training programs. Courses in office procedures seldom incorporate the techniques required to successfully screen both people and information.

Oftentimes interpersonal skills are assessed by employers during job interviews. Medley (1970) reported that personal impression of the applicant was the single most important criterion during the hiring process. Within the secretarial curriculum students should be exposed to identifying and handling common interpersonal situations since these are the skills that separate the lower-paying secretary from the higher-paying secretary. The *L.A. Times* employment advertisements support this statement in such comments as "works well with others," "deals pleasantly with customers," and "is a team member." My university's president feels that skills to serve the gatekeeping function are the ones that separate the entry-level secretary from the experienced secretary.

He remarked that these skills are the ones he personally finds invaluable.

Gigliotti(1986) suggests that simulations be included into the secretarial curriculum. These simulations should provide students a variety of opportunities to participate in mock office situations. Such simulations force the student to perceive the decision-making and people skills which are required on the job. CareerTrack, an independent corporation, offers a popular one-day training seminar entitled "How to Deal with Difficult People (1987)." My visits and classroom observations revealed few such activities as part of secretarial and basic office management programs. Nowak(1989) remarked how he utilized "Book of Interruptions," a series of thirty common office situations which he had students act out during his course taught several years ago. He also mentioned that concommitant with on-the-job internships, he met with students once a week to discuss interpersonal problems they each faced during the past week. The model school in Tucson included discussion, role simulations and conflict resolution in their course on office management techniques. A school counsellor is a member of their instructional team and directs that part of the course. This counsellor also advises students for job interviews on bodily posture, dress, and appropriate speech.

My concern is that both entry-level and advanced courses in office management include courses and role simulations to develop interpersonal skills. If secretarial program planners decide to ignore the need because the skills are so complex or place such instruction within advanced management training, secretaries will remain technological functionaries. The ability to skillfully serve as a gatekeeper requires complex social skills which are not rapidly acquired. Therefore, entry-level secretarial programs should include introduction of the most basic skills. The beginner may not have the expertise for conflict resolution, but the beginner could become an

"active listener" and acquire the knowledge to diagnose a possible conflict and learn some techniques to diffuse possible confrontations. An example is identifying the angry caller and asking him to tell why he is angry. Before the caller is transferred to the manager, the secretary can inform the manager why the caller is angry. In such a situation, the manager is provided a few extra moments to calculate his behavior and to prepare a strategy for the gentle care of the angry caller and to diffuse potential difficulties.

Concerns about English and General Education

Two major recurring concerns within business education in U.S.A. are English instruction and mandating un-related liberal arts or general education courses within the secretarial curriculum. In the U.S.A. the question is not whether to teach English and one or more other languages. Our immigrants come from around the globe and our nation could be multi-lingual. Offering instruction in only one other language, such as Spanish, is not an alternative. Our public schools are experiencing problems instructing in our dominant language of English. The question here is who is responsible for English instruction in business education programs. Secretarial educators often expect students to have mastered required skills in English prior to entering secretarial courses.

U.S.A. is a country of many cultures and languages, yet English is the language of the business world. Students must enter the job with a good command of English. However, students enter secretarial education programs with varying degress of command of this language. Instructors in these programs have to stress correct usage of grammar and words. Oftentimes, instructors of secretarial programs feels that teaching the English language is not part of their job. However, it is. The prospective secretary wants to get a good-

paying job. Good-paying jobs are filled by secretaries with good English skills. Therefore, secretarial instructors have the attention of students at this time and can teach English more effectively than a high school teacher.

The concern about core education course being mandated has been met with this contemporary solution. Students may complete a secretarial training program with no general education courses as history, literature and the like. However, if they wish to complete an Associate of Arts or four-year degree, they must complete such courses. Since secretarial education courses lead directly to paying jobs, both the prospective secretaries and the government support completion of secretarial courses before work in general education. The employed secretary can continue his or her education taking general education courses after employment.

From Secretary to Management

Secretarial education has become a part of the career ladder to higher management positions. The newest Supreme Court judge in California, Joyce L. Kennard, is an Asian-born immigrant who began her career as a secretary.

Secretarial training is becoming a stepping stone to office management. Our previous examination of the functions of the secretary indicates reasons the secretary has the basic skills leading to these higher-paying management positions. Secretarial education in the 1990's should plan for this advancement from entry-level secretary to office manager.

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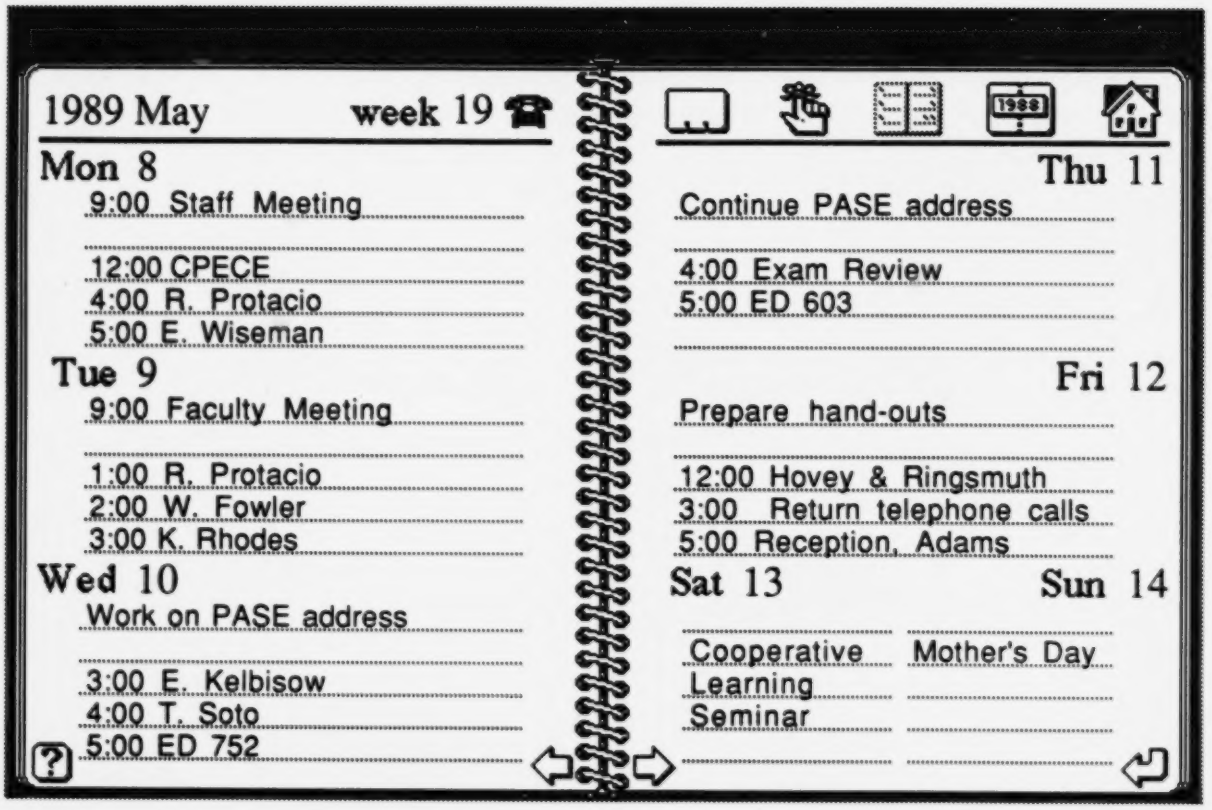
Sample Weekly Calendar Using Hypercard



Sample Address Card Using Hypercard